Module 7B Simulation Completing a Tax Return Using Married Filing Separate Filing Status

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23

In this simulation, you will take on the role of Belinda Russell in order to learn how to complete a tax return using the Married Filing Separate filing status.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23

Your Tax Year January 1

December 31 January 1

Your Filing Season

April 15

You are married to Jesse Russell. You are both U.S. citizens and you live in the United States. You have no children. Because of financial problems caused by your first husband, you refuse to file a joint return with anyone, including Jesse. You will file your own tax return and claim an exemption for yourself. Jesse will file his own tax return and claim an exemption for himself.



January 1 December 31 January 1 Your Filing Season
April 15

You are a dietician at a retirement home. You have interest income from your savings account.

To review your personal information, click My Profile below.



My Profile

Name: Belinda Russell Employment: Dietician Marital status: Married

Spouse's name (if any): Jesse Russell

Children: None U.S. Citizen: Yes

Other: Because of financial problems caused by your first husband, you refuse to file a joint return with anyone, including Jesse. You will file your own tax return and claim an exemption for yourself. Jesse will file his own tax return and claim an exemption for himself. You earn interest income from a savings account.

Your Tax Year January 1

December 31 January 1

Your Filing Season

April 15

It's the end of the tax year. You receive your W-2 from your employer. It shows you have earned \$33,255 from your job.

Note: Your employer is required to send your W-2 by January 31!

To review your Form W-2, click My Form W-2 below.



		a Employee's social security number 222-00-5589	OMB No. 154	15-0008	Safe, accurate, FAST! Use	≯fi		ne IRS website w.irs.gov/efile.
b	Employer identification number 10-2315682	(EIN)	_	1 Wa	ges, tips, other compensation \$33,255	2 F	ederal income t	tax withheld \$3,000
С	Employer's name, address, and Anytown Retirement H			3 Soc	cial security wages \$33,255	4 S	ocial security ta \$2,	ax withheld ,061.81
	205 Center Circle Anytown, US 10123			5 Me	dicare wages and tips \$33,255	6 M	ledicare tax wit	thheld 3482.20
				7 Soc	cial security tips	8 A	llocated tips	
d	Control number			9 Adv	vance EIC payment	10 D	ependent care	benefits
е	Employee's first name and initia	l Last name	Suff.	11 No	nqualified plans	12a S	ee instructions	for box 12
	Belinda W.	Russell				o d e		
	5010 Daintree Drive			13 Statuto employ	ry Retirement Third-party ree plan sick pay	12b		
	Anytown, US 10122			14 Oth	ner	12c		
						12d		
f	Employee's address and ZIP co	de						
15	State Employer's state ID num	16 State wages, tips, etc.	17 State incon	ne tax	18 Local wages, tips, etc.	19 Local	income tax	20 Locality name
								1

Wage and Tax Statement



Department of the Treasury-Internal Revenue Service

January 1 December 31 January 1 April 15

You receive Form 1099-INT from the credit union. You earned \$357.00 interest from your credit union.

To review your Form 1099-INT, click My Form 1099-INT below.



☐ CORRECTED (if checked)

		OTED (II CHCCRCG)		_	
PAYER'S name, street address, city,	state, ZIP code, and telephone no.	Payer's RTN (optional)	OMB No. 1545-0112		
Anytown Credit Union 33 Circle Drive Anytown, US 10011		1 Interest income \$ 357.00 2 Early withdrawal penalty	2007	Inte	rest Income
		\$	Form 1099-INT		
PAYER'S federal identification number	RECIPIENT'S identification number	3 Interest on U.S. Savings Bo	nds and Treas. obligati	ons	Сору В
10-2234601	222-00-5589	\$	•		For Recipient
RECIPIENT'S name		4 Federal income tax withheld	5 Investment expenses	S	This is important tax
Belinda Russell		\$	\$		information and is being furnished to the Internal Revenue
Street address (including apt. no.)		6 Foreign tax paid	7 Foreign country or	U.S.	Service. If you are required to file a return,
5010 Daintree Drive		\$	possession		a negligence penalty or
City, state, and ZIP code Anytown, US 10122		8 Tax-exempt interest	Specified private a bond interest	ctivity	other sanction may be imposed on you if this income is taxable and
Account number (see instructions)]			the IRS determines that it has not been
		\$	\$		reported.

Form **1099-INT**

(keep for your records)

Department of the Treasury - Internal Revenue Service

January 1 December 31 January 1 April 15

You have everything you need to file your taxes. You will be using Form 1040A because of your filing status.

1040A		U.S	. Ind	ividu	ai ind	come	I GA I	ictui ii	(99)		007	11767	ree only-	200 1101	milite or e	robus as a	his space		
Label	7	Your fir	st name	and initial			Last	name						1	OMB N	lo. 1545-	0074		
(See page 18.)	Ι.													Your	social se	curity nu	mber	_	
(see page 10.)	A B														- 1				
Here the	E	If a join	t return,	spouse's fi	ist name	and initial	Last	name						Spous	e's social	security	number		
Use the IRS label.	1.																	_	
Otherwise.	E B	Home a	ddress (number an	d street).	If you have a	P.O. box,	see page 1	8.			A	pt. no.		You mu s				
please print	R E													-)	our SSI	N(8) abo	ve.	-	
or type.	[-	City, to	wn or po	st office, s	tate, and	ZIP code. If	you have a	foreign add	tross, see	page 18.					ng a bo				
Presidential		- Ch	de been	7.0									-	change	your ta	x or refu			
Licotion ounig	/urgin			5 18 3.000 L	OF BOOKIE	spouse i	f filina isi	inthe sure	nt \$3 to	an to the	bis fund	lege pa	no 19\		Vou		nauca		
					or your	spouse i	f filing joi	intly, war	nt \$3 to		_	(see pa		ا کا ا	You		pouse	-	
Filing		1 🛚	Sin	gle						go to th	Head	of house	hold (wit	h qualifyi	ng perso	on). (See	page 19.)	
Filing status			Sin	gle		spouse i					Head	of house	hold (wit	h qualifyi is a chil	ng perso	on). (See	page 19.)	
		1 🛚	Sin	gle							Head	of house	hold (wit	h qualifyi is a chil	ng perso	on). (See	page 19.)	
		1 🛚	Sin	gle							Head	of house	hold (wit	h qualifyi is a chil	ng perso	on). (See	page 19.)	
	4	1 🛚	Sin	gle	g jointly						Head	of house	hold (wit	h qualifyi is a chil	ng perso	on). (See	page 19.	2 2	23
status	4	1 2	Sin Man	gle ried filing	g jointly	(even if o	only one	had inco	ome)	4	Head If the	of house qualifyin	hold (wit g person	is a chil	ng perso d but no	on). (See t your de	page 19. ependent		23
status	4	5	Sin Man	gle ried filing	g jointly	(even if o	only one	had inco	ome)	14	Head If the	of house qualifyin	hold (wit g person	is a chil	ng perso d but no	on). (See t your de	page 19. ependent		23
status	4	5	Sin Man	gle ried filing	g jointly	(even if o	only one	had inco	ome)	14	Head If the	of house qualifyin	hold (wit g person	is a chil	ng perso d but no	on). (See t your de	page 19. ependent		2 3
status	4	5	Sin Man	gle ried filing	g jointly	(even if o	only one	had inco	ome)	14	Head If the	of house qualifyin	hold (wit g person	is a chil	ng perso d but no	on). (See t your de	page 19. ependent		2 3
status	4	5	Sin Man	gle ried filing	g jointly	(even if o	only one	had inco	ome)	14	Head If the	of house qualifyin	hold (wit g person	is a chil	ng perso d but no	on). (See t your de	page 19. ependent		2 3
status	4	5	Sin Man	gle ried filing	g jointly	(even if o	only one	had inco	ome)	14	Head If the	of house qualifyin	hold (wit g person	is a chil	ng perso d but no	on). (See t your de	page 19. ependent		2 3
status	4	5	Sin Man	gle ried filing	g jointly	(even if o	only one	had inco	ome)	14	Head If the	of house qualifyin	hold (wit g person	is a chil	ng perso d but no	on). (See t your de	page 19. ependent		23
status	4	5	Sin Man	gle ried filing	g jointly	(even if o	only one	had inco	ome)	14	Head If the	of house qualifyin	hold (wit g person	is a chil	ng perso d but no	on). (See t your de	page 19. ependent		23



What is your filing status?

- O Single
- O Married filing joint
- Married filing separate
- O Head of household (with qualifying person)
- O Qualifying widow(er) with dependent child

9 12 13 14 15 16 17 18 19 20 21 22 23 My Form W-2 My Form 1099-INT My Profile

Your Tax Year January 1

December 31 January 1

Your Filing Season

April 15

Use your W-2 to enter your salary on your Form 1040A. Enter your salary exactly as it appears on your W-2.

Г (1	00055	
Enter salary:	\$133255	

Form 1040A		ment of the Treasury—Internal Revenu		2007 IRS I						
	_	at name and initial	ax Return (99)	2007 IRS	Jse Only—		or staple in this space. MB No. 1545-0074			
(See page 18.)	1.5-2.1	linda W.	Russell				al security number			
Use the IRS label.		t return, spouse's first name and initial	Last name			Spouse's	social security number			
Otherwise, B B	501	iddress (number and street). If you have a P.S. 10 Daintree Drive where or post office, state, and ZIP code. If you			pt. no.	A your	must enter r SSN(s) above.			
Presidential Election Campaign	Any	ytown, US 10122			ل_	change yo	a box below will not ur tax or refund. You Spouse			
Filing status Check only one box.	1	Single Married filing jointly (even if only	one had income)	4 Head of house If the qualifyin enter this chik	ehold (with g person t's name h	old (with qualifying person). (See page 19.) person is a child but not your dependent,				
Exemptions	6a	Vourself. If someone c	an claim you as a d				Boxes checked on 6a and 6b			
If more than six	c	Spouse Dependents: (1) First name Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	child tax or	qualifying for child edit (see ge 21)	No. of children on 6c who: • lived with you			
dependents, see page 21.							with you due to divorce or separation (see page 22)			
							Dependents on 6c not entered above			
	d	Total number of exemption	s claimed.	£			Add numbers on lines above			
Income	7	Wages, salaries, tips, etc.	Attach Form(s) W-2.	0,		7				
Attach Form(s) W-2 here. Also attach	8a	Taxable interest. Attach So Tax-exempt interest. Do n	chedule 1 if required			8a				
Form(s) 1099-R if tax	9a	Ordinary dividends. Attach S	Schedule 1 if required			9a				

Hint: See Box 1 on your Form W-2.

Your Tax Year January 1

December 31 January 1

Your Filing Season

April 15

Use your Form 1099-INT to enter your interest income on your 1040A. Enter your interest exactly as it appears on your 1099-INT.

Enter interest:	\$	357
-----------------	----	-----

Form		Department of the Treasury-Internal Revenu	e Service								
1040A		U.S. Individual Income Ta	ax Return (99)	2007 IRS U	se Only—	Do not writ	te or staple in this s	pace.			
Label	\neg	Your first name and initial	Last name				MB No. 1545-0074				
(See page 18.)	u	Belinda W.	Russell				ial security numbe	ж			
	A B						2 00 5589				
Use the	E	If a joint return, epouse's first name and initial	Last name				social security num	ber			
IRS label.	H	Home address (number and street). If you have a P.0) how one mane 18	A-	rt. no.		222 00 5909				
Otherwise, please print	E R E	5010 Daintree Drive			n. no.		ı must enter ır SSN(s) above.	<u> </u>			
or type.	١,		town or post office, state, and ZIP code. If you have a foreign address, see page 18. Checking a box below will not								
Presidential	\subseteq	Anytown, US 10122 change your tax or refund.									
Election Campai											
Filing status Check only	1 ☐ Single 2 ☐ Married filing jointly (even if only one had income) 3 ☑ Married filing separately. Enter spouse's SSN above and										
one box.		full name here. ► Jesse J.	Russell	5 Qualifying wide	ow(er) with	h depende	nt child (see page	20)			
Exemption	าร	6a Yourself. If someone c	an claim you as a d	lependent, do no	t check	` }	Boxes checked on 6a and 6b	1			
		b Spouse				<u>J</u>	No. of children				
		c Dependents:	(2) Dependent's social	qualifying or child edit (see	on 6c who: • lived with						
If more than six		(1) First name Last name	security number	you		e 21)	you • did not live				
dependents,							with you due				
see page 21.					[to divorce or separation				
							(see page 22)				
					L	-	Dependents on 6c not				
					L	┽—	entered above				
		d Total number of exemption	s claimed	5	<u> </u>		Add numbers on lines above ►	1			
Income		a rote name of ortempor	0 0101111001					$\overline{}$			
		7 Wages, salaries, tips, etc.	Attach Form(s) W-2			7	33,255	00			
Attach Form(s) W-2											
here. Also		8a Taxable interest. Attach Se				8a					
attach		b Tax-exempt interest. Do n		8b							
Form(s) 1099-R if tax		9a Ordinary dividends. Attach			-	9a		-			
was withheld.		b Qualified dividends (see pa		9b							
		10 Capital gain distributions (see page 25).			10					

January 1 December 31 January 1 Your Filing Season
April 15

Use your W-2 to enter your federal tax withheld. Enter your tax withheld exactly as it appears on your W-2.

Enter federal tax withheld: \$\\ 3000

0,700	00	Detirement on incorporation tipe and it. Attack		
and of	33	Retirement savings contributions credit. Attach		
usehold.		Form 8880.	33	
,850	34	Add lines 29 through 33. These are your total credi	its.	34
	35	Subtract line 34 from line 28. If line 34 is more than lin	ne 28, enter -0	35
	36	Advance earned income credit payments from Form	n(s) W-2, box 9.	36
	37	Add lines 35 and 36. This is your total tax.	•	37
	38	Federal income tax withheld from Forms W-2 and 1099.	38	
	39	2007 estimated tax payments and amount		
you have		applied from 2006 return.	39	
qualifying hild, attach	40a	Earned income credit (EIC).	40a	
chedule	b	Nontaxable combat pay election. 40b		
IC.	41	Additional child tax credit. Attach Form 8812.	41	
	42	Add lines 38, 39, 40a, and 41. These are your total	payments.	▶ 42
efund	43	If line 42 is more than line 37, subtract line 37 from	line 42.	
0.0.10		This is the amount you overpaid.		43

Hint: See Box 2 on your Form W-2.

10 11 12 13 14 15 16 17 18 19 20 21 22 23 My Profile My Form W-2 My Form 1099-INT



Since you have no other sources of income, you have completed your tax return. All that's left to do is review your return.

To review your tax return, click My Tax Form below.

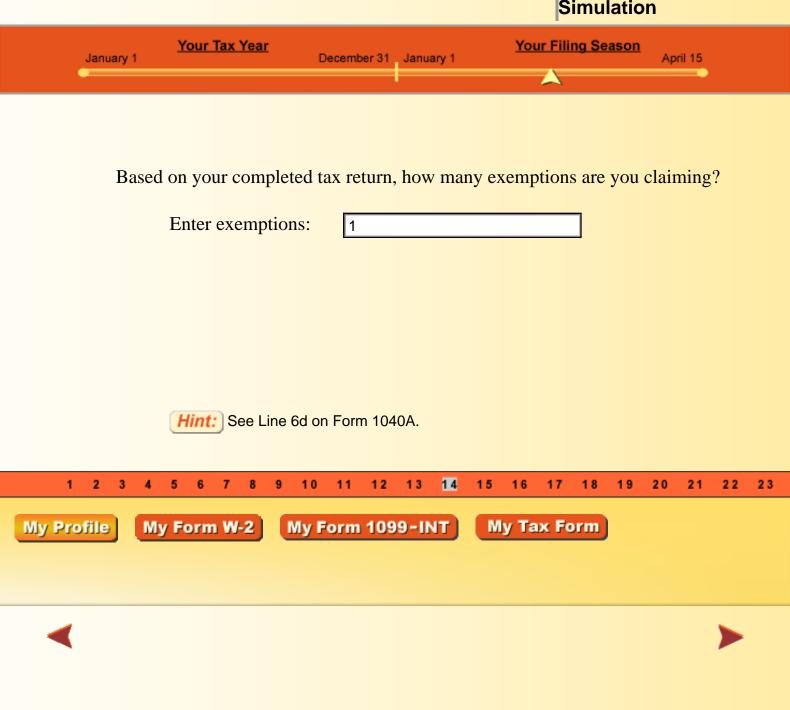


1040A		U.S	. Individual	Income Ta	x Retu	rn (99)	2007	IRS U	lse Only-	–Do n	ot writ	te or staple in this sp	oace.
Label		Your fire	st name and initial		Last name				``	`	C	OMB No. 1545-0074	
(See page 18.)	L									Yo	ur soc	cial security number	r
, , ,	A B	Belino			Russell						222	00 558	
Use the	E	If a join	t return, spouse's first r	name and initial	Last name					1		social security number	
IRS label.	н	Home a	address (number and st	reet). If vou have a P.C), box, see pac	ie 18.		Ar	ot. no.	-	222	00 590	<u> </u>
Otherwise,	E R	l	Daintree Drive	, ,	, , , , , ,	,						u must enter ur SSN(s) above. <i>u</i>	
please print or type.	Е		wn or post office, state	, and ZIP code. If you	have a foreign	address, see pag	ge 18.			Che	eckina	a box below will n	not
Presidential			wn, US 10122									our tax or refund.	
Election Campa	ign	Che	ck here if you, or	your spouse if fili	ing jointly, v	want \$3 to g	o to this fund	(see pag	ge 18)	<u> </u>		You Spou	se
Filing		1	Single									person). (See page	
status		2 _		ointly (even if only		,		qualitying his child				out not your depend	aent,
Check only one box.		3 🛂	Married filing so full name here	eparately. Enter s Jesse J. R	spouse's St	SN above an	u				_	ent child (see page	20)
Evemption	36	6a	✓ Yourself.			VOLL AS A (. ,)	Boxes	/
Exemption	15	ou	_	box 6a.	ari olaliri	you as a v	аоронаон,	uo 110	Conce	/IX	}	checked on 6a and 6b	1
		b					1		· · · /		J	No. of children	
		С	Dependents:		(2) Depen	ident's social	(3) Depend		(4) √it	quali for c		on 6c who: lived with	
			(1) First name	Last name		ty number	relationsh you	ip to	tax c	redit ((see	you	
If more than six dependents,			.,		<u> </u>	<u> </u>	,		ρa	ge z i)	 did not live with you due 	
see page 21.					:	1				Ħ		to divorce or separation	
												(see page 22)	
												Dependents	
										<u></u>		on 6c not entered above	
												Add numbers	
		Ч	Total number	of exemption	s claimed	4						on lines above ▶	1
Income			Total Harrison	or exemption	o olali iloc	4.						above P	
		7	Wages, salari	es, tips, etc.	Attach Fo	orm(s) W-2	2.				7	33,255	00
Attach Form(s) W-2													
here. Also			Taxable inter								8a	357	00
attach Form(s)		9a	Tax-exempt Ordinary divid								9a		
1099-R if tax			Qualified divid			Tirrequire	9b				эа		
was withheld		10		distributions (s		25).	00				10		
If you did not		11a			- 1 0		11b Taxa	ble an	nount				
get a W-2, see page 24.			distributions.	11a				page 2			11b		
Enclose, but do		12a	Pensions and					ble an					
not attach, any			annuities.	12a			(see	page 2	26).		12b		
payment.		13	Unemployme	nt compensat	ion and	 ∆laska Per	manent Fu	nd divi	dends		13		
			Social securit		ion and i	laska i ci	14b Taxa			'•	10		
		114	benefits.	14a				page 2			14b		
						•							
		15	Add lines 7 th	rough 14b (far	right col	umn). This	is your tota	lincon	ne.	<u> </u>	15	33,612	00
Adjusted		16	Educator ove	anaaa (aaa na	aa 00\		16						
gross		16 17		enses (see pa n (see page 2	· ·		17						
income		18		interest dedu	,	e page 31							
		<u> </u>	3.3.30.12.10411		2.3.7 (00)	-							
		19	Tuition and fe	es deduction	. Attach I	Form 8917	'. 19						
		20	Add lines 16	through 19. T	hese are	your tota	l adjustme	nts.			20		
		04	Outstand 11	00 fu "	(E This i		و د ادمامو	_ ! :			04		
		21	Subtract line	20 from line 1	ıb. This i	s your adj	ustea gros	s inco	me.		21	33,612	00

Department of the Treasury-Internal Revenue Service

Form

Form 1040A	(2007			Pa	age 2
Tax,	22	Enter the amount from line 21 (adjusted gross income).	2	22 33,612	00
credits,					
and	23a	Check You were born before January 2, 1943, Blind Total boxes	Λ		
payments		if:			
Standard	b				
Deduction	04	deductions, see page 32 and check here		5 250	
for—	24 25	Enter your standard deduction (see left margin). Subtract line 24 from line 22. If line 24 is more than line 22, enter -0		5,350	00
 People who checked any 	26	If line 22 is \$117,300 or less, multiply \$3,400 by the total number of exempt		25 28,262	00
box on line	20	claimed on line 6d. If line 22 is over \$117,300, see the worksheet on page		3,400	00
23a or 23b or who can be	27	Subtract line 26 from line 25. If line 26 is more than line 25, enter -0	<i>52.</i> 2	.0 3,400	00
claimed as a	21	This is your taxable income .) > 2	27 24,862	00
dependent, see page 32.	28	Tax, including any alternative minimum tax (see page 32).		28 3,340	00
All others:	29	Credit for child and dependent care expenses.			
Single or		Attach Schedule 2. 29			
Married filing separately,	30	Credit for the elderly or the disabled. Attach			
\$5,350		Schedule 3.			
Married filing	31	Education credits. Attach Form 8863. 31			
jointly or Qualifying	32	Child tax credit (see page 37). Attach			
widow(er),		Form 8901 if required. 32			
\$10,700	33	Retirement savings contributions credit. Attach			
Head of household,		Form 8880. 33			
\$7,850	34	Add lines 29 through 33. These are your total credits.		34	
	35	Subtract line 34 from line 28. If line 34 is more than line 28, enter -0		35 3,340	00
	36	Advance earned income credit payments from Form(s) W-2, box 9.		36	
	37	Add lines 35 and 36. This is your total tax.		3, 340	00
	38	Federal income tax withheld from Forms W-2 and 1099. 38 3,000	0 00		
[f	39	2007 estimated tax payments and amount			
If you have a qualifying	400	applied from 2006 return. 39			
child, attach	40a b	Earned income credit (EIC). 40a Nontaxable combat pay election. 40b			
Schedule EIC.	41	Additional child tax credit. Attach Form 8812. 41			
	42	Add lines 38, 39, 40a, and 41. These are your total payments.	→ 4	2 3,000	00
Defend	43	If line 42 is more than line 37, subtract line 37 from line 42.		2 0,000	+
Refund	.0	This is the amount you overpaid.	4	.3	
Direct	44a	Amount of line 43 you want refunded to you. If Form 8888 is attached, check here	▶ □ 4	l4a	
deposit? See page 53	▶ b	Routing Chapting Chapting Covings			
and fill in 44b, 44c,					
and 44d or Form 8888.	► d	Account number			
0000.	45	Amount of line 43 you want applied to your			
		2008 estimated tax. 45			
Amount	46	Amount you owe. Subtract line 42 from line 37. For details on how			
you owe		to pay, see page 54.	<u> </u>	6 340	00
	47	Estimated tax penalty (see page 54). 47	1		
Third party		Do you want to allow another person to discuss this return with the IRS (see page 55)?	Yes. Co	mplete the following.	No
designee		· · · · · · · · · · · · · · · · · · ·	onal identif	ication	
Cian		name ► () num Inder penalties of perjury, I declare that I have examined this return and accompanying schedules and s	ber (PIN)	and to the best of my	
Sign	k	mowledge and belief, they are true, correct, and accurately list all amounts and sources of income I receive	ed during th		
here Joint return?		of preparer (other than the taxpayer) is based on all information of which the preparer has any knowledge four signature Date Your occupation	je.	Daytime phone number	er
See page 18.		dietician			
Кеер а сору	5	Spouse's signature. If a joint return, both must sign. Date Spouse's occupation			
for your records.					
Paid	F	Preparer's Date Check if		Preparer's SSN or PTIN	
		Check if self-employ	yed 🔲		
preparer's		Firm's name (or EIN			
use only		rours if self-employed),	ne no	()	



January 1 December 31 January 1 Your Filing Season
April 15

Correct! Line 6d shows that you claim one exemption for yourself. What is your adjusted gross income? Enter your adjusted gross income exactly as it appears on your tax form.

Enter adjusted gross income: \$\\ 33612

Hint: See Line 21 on Form 1040A.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23

My Profile My Form W-2 My Form 1099-INT My Tax Form

January 1 December 31 January 1 Your Filing Season
April 15

Correct! Line 21 shows that your adjusted gross income is \$33612.00. What is your standard deduction? Enter your standard deduction exactly as it appears on your tax form.

Enter standard deduction: \$
5350

Hint: See Line 24 on Form 1040A.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23

My Profile My Form W-2 My Form 1099-INT My Tax Form

January 1 December 31 January 1 April 15

Correct! Line 24 shows that your standard deduction is \$5,350.00. What is the dollar amount claimed for exemptions? Enter the amount exactly as it appears on your tax form.

Enter amount for exemptions:

\$ 3400

Hint: See Line 26 on Form 1040A.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23

My Profile My Form W-2 My Form 1099-INT My Tax Form

							S	imulatio	n		
Janua	ıry 1	Your Tax Yea	ır	December 31	January 1		Your Fili	ng Season	April 15		
		re correct! Li		·		A show	vs that t	he amoun	t		
	What tax fo	is your total t	tax? Eı	nter your t	otal tax ex	actly a	as it app	ears on y	our		
		Enter total t	ax: (\$							
		Hint: See I									
1 2	3 4	5 6 7 8	9 1	0 11 12	13 14	15 1	16 17	18 19	20 21	2 2	23
My Profile	My	y Form W-2	Му	Form 10	99-INT	Му	Tax Fo	rm			

January 1 December 31 January 1 April 15

That's correct! Line 37 shows that your total tax is \$3,340.00. Are you getting a refund or do you owe more tax?

- O Refund
- Owe more taxes

Hint: See Line 46 on Form 1040A.

10 11 12 13 14 15 16 17 19 20 22 23 My Profile My Form W-2 My Tax Form My Form 1099-INT

January 1 December 31 January 1 April 15

Yes! You are correct. Line 46 on your 1040A shows that you owe \$340.00.

Total tax (Line 37)	\$ 3,340
Federal tax withheld (Line 38)	- 3,000
Amount owed (Line 46)	\$ 340

Now you are ready to e-file your tax return with the IRS. Remember to request an electronic funds withdrawal to pay the amount due! Click the e-file button below to continue.





Your Tax Year
January 1

December 31 January

Your Filing Season

April 15

If you were actually filing your taxes online, you would now be asked to select how you want to receive your refund. You can receive your refund by:

- authorizing a direct deposit (automatic deposit) into a checking or savings account, or
- requesting a check be sent to you.

Opting to receive a refund by direct deposit is the fastest and most convenient way to receive a refund. Your refund should be in your savings or checking account within two weeks if you chose direct deposit. If you opt for a paper check, it will take about three weeks.



Your Tax Year
January 1

December 31 January

Your Filing Season

April 15

The last step would be signing the return. You can submit your signature by actually signing Form 8453 and sending it to the IRS, or by using Self-Select PIN (Personal Identification Number) if you are eligible.

The Self-Select PIN is made up of any five numbers (except all zeros) that you choose to enter as your electronic signature. You select your PIN by providing your adjusted gross income from your previous year's tax return and your date of birth for verification purposes. Depending on the version of the software you are using, you may be asked to provide your date of birth in addition to your adjusted gross income.

Signing your return using Self-Select PIN is the simplest and fastest way to submit your signature. You do not need to mail in a paper signature, and you receive an immediate acknowledgement that your tax return was received.

Learn more about self-selecting a PIN by visiting the IRS Web site.

Now click the forward arrow below to finish filing Belinda's return.

1 2 16 22 23 10 11 12 13 14 15 17 18 19 20 21 My Profile My Form W-2 My Form 1099-INT My Tax Form

Your Tax Year January 1

December 31 January 1

Your Filing Season

April 15

Congratulations, Belinda! You've successfully filed your return by the filing deadline.

23 12 14 15 16 17 18 19 20 22